



Public Service Broadcasting:
Report 2010 Annexes
Information Pack F
Background and methodologies

Research Document

Publication date: 8th July 2010

Contents

Annex		Page
1	Background to the PSB Annual Report 2010	1
2	Methodologies	10

Annex 1

Background to the PSB Annual Report 2010

1.1 Assessment of PSB

Ofcom has a duty to assess the designated public service broadcasters, taken together, in terms of their delivery of the public service purposes as set out in the 2003 Communications Act. The designated PSB broadcasters are the BBC¹, ITV1², GMTV1, Channel 4, Five, S4C and Teletext³.

The public service purposes outlined in the 2003 Communications Act were⁴:

- to deal with a wide range of subjects;
- to cater for the widest possible range of audiences – across different times of day and through different types of programme; and
- to maintain high standards of programme-making.

Based on the public service purposes presented in the Act, in its first PSB Review, Ofcom developed a range of PSB purposes and characteristics to provide a detailed description of public service broadcasting. The first PSB Review also stated that, in delivering its duties, Ofcom should develop a new approach to assessing the effectiveness of the public service broadcasters, taken together, in delivering PSB. This assessment would include an audience tracking survey to evaluate audience opinions, as well as broadcaster spend, output and viewing data. The aim was to provide a common basis for understanding the delivery of PSB and resulted in the publication of the PSB Annual Reports.

Since this time, the Digital Economy Act has been passed and the majority of it came into force in June 2010. This means that in addition to the requirements outlined above, from June 2010 the Act extends Ofcom's PSB reporting duties to include public service content online and on VoD, as well as on television and radio. It also gives Ofcom powers to monitor and enforce C4C's media content duties, to report on whether the public teletext service licence remains commercially sustainable, and to assess the public value of continuing the service. However, the data reported here precedes the Digital Economy Act 2010 and our reporting focuses largely on PSB delivery through television services, rather than public service content (PSC) more broadly.

This is the fourth of Ofcom's PSB annual reports. It sets out to provide an evidence base for assessing the delivery of public service broadcasting (PSB). Its purpose is to enable Ofcom

¹ The BBC PSB channels are BBC One, BBC Two, BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. Note: the focus is upon generalist channels.

² Throughout this document we refer to the Channel 3 regional licensees by the most commonly used collective terms, ITV1, or simply ITV. However, these terms are not used within the devolved nations. Instead Channel 3 is referred to as STV in north and central Scotland, UTV in Northern Ireland and ITV1 Wales in Wales. Where appropriate, therefore, we refer to STV, UTV and ITV1 Wales separately.

³ On July 16 2009, the Daily Mail & General Trust plc (DMGT) announced its intention to hand back its PSB licence and shut down both the PSB analogue and PSB Digital Terrestrial Television service. Teletext Ltd ceased to provide the public teletext services in December 2009, and its licence was revoked by Ofcom in January 2010. For more detail on the remit of the public service text services, see *PSB Annual Report 2010 – information pack F*.

⁴ See clause 264 of the Communications Act 2003 for the full wording and more detail on these.

and its stakeholders to gain a deeper understanding of the current position of PSB delivery in the UK, and how this changed between 2005 and 2009.

While the key purpose of this report is to show how PSB is being achieved in the UK, it must also look at the contributions of the individual PSB channels. It is not, however, designed to provide an assessment of the individual performance of the public service broadcasters.

For the purpose of this report, delivery of PSB purposes and characteristics has been assessed in three ways; broadcasters' spend and output, viewing, and audience impact.

1.2 Structure of the report

This report has been published in a modular format, or information pack. The sections are:

- A. Summary: *outlining the key themes and bringing together findings identified throughout the rest of the modules.*
- B. Overview of UK television market: *background to the television market and key consumer trends.*
- C. PSB output and spend: *providing a picture of the investment in PSB and the resulting hours of PSB programming.*
- D. PSB viewing: *reporting BARB data on PSB viewing.*
- E. PSB audience opinions: *audience opinions on the importance and delivery of PSB by the PSB channels, collected in Ofcom's PSB Tracker survey.*
- F. Appendix: *background to PSB and reporting, research methodologies/analysis.*
- G. PSB compliance reporting: *for the first time, compliance data has been published alongside the PSB Annual Report, in order that the related data can be considered together. Previously, the data on PSB compliance with quotas were published within the CMR⁵.*
- H. Perceptions of, and attitudes towards, television; programme standards, protection of children, attitudes towards news and television advertising: *broadcasting-related data from the Ofcom Media Tracker. Some of this has remained the same since the Independent Television Commission (ITC) first began the survey, then known as The Public's View.*

Within each information pack there are separate sections focusing on the purpose and characteristics or programme genres, depending on what is most appropriate for the data being reported. Specific sections focus on children's television, S4C, Teletext, the devolved nations and English regions across a number of the information packs.

1.3 PSB context

The PSB Annual Report sets out to provide an on-going evidence base for assessing the delivery of PSB, building towards Ofcom's PSB Reviews that must be conducted at least every five years. The purpose is to enable both Ofcom and its stakeholders to gain a deeper understanding of the current position of PSB delivery in the UK, and how this has changed. Useful context, and related Ofcom publications, are outlined below.

⁵ This reporting fulfils our duties under Section 358 (3) of the Communications Act 2003.

PSB purposes and characteristics

Figure 1 outlines the PSB purposes and characteristics reported here. They are based on the purposes presented in the Communications Act 2003 and developed in Ofcom's first PSB Review in 2005.

Figure 1 PSB purposes and characteristics

<p>PSB purposes</p> <p>Informing our understanding of the world - To inform ourselves and others and to increase our understanding of the world through news, information and analysis of current events and ideas</p> <p>Stimulating knowledge and learning -To stimulate our interest in and knowledge of arts, science, history and other topics through content that is accessible and can encourage informal learning</p> <p>Reflecting UK cultural identity - To reflect and strengthen our cultural identity through original programming at UK, national and regional level, on occasion bringing audiences together for shared experiences</p> <p>Representing diversity and alternative viewpoints - To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere</p>
<p>PSB characteristics*</p> <p>High quality - well-funded and well-produced</p> <p>Original – new UK content rather than repeats or acquisitions</p> <p>Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones</p> <p>Challenging – making viewers think</p> <p>Engaging – remaining accessible and attractive to viewers</p> <p>Widely available – if content is publicly funded, a large majority of citizens need to be given the chance to watch it</p> <p>Trust*</p>

* Although *Trust* is not a PSB characteristic outlined in the PSB Review in 2004, it is considered alongside these characteristics throughout the report. It was added to the PSB tracker in 2007 to monitor the extent to which people trust the main PSB channels as the digital TV environment expands.

Although the PSB channels are expected together to fulfil the purposes and characteristics, within the PSB system, it is also acknowledged that each PSB channel has a different remit (with access to different funding sources and different institutional approaches). These are summarised by Ofcom as⁶:

- The BBC is the cornerstone of PSB, with special responsibility for investing in distinctive content and always striving to meet PSB purposes and characteristics;
- ITV1 focuses on News and high production-value origination from around the UK. ITV1 has additional responsibility for the provision of regional News, Current Affairs and other regional programming⁷;

⁶ Phase 3 – Competition for quality: Ofcom review of public service television broadcasting, February 2005.

⁷ The requirements within these areas have been revised following the publication of Ofcom's statement on short term regulatory decisions in parallel with Ofcom's Second Public Service Broadcasting Review phase 2: preparing for the digital future, January 2009. For more detail see http://www.ofcom.org.uk/consult/condocs/psb2_phase2/shortterm/

- Channel 4 has a specific remit for innovation, educative programming and distinctiveness;
- Five is primarily market-led with a focus on UK original production;
- S4C has a key role in Welsh language public service broadcasting;
- Teletext had a remit for a range of high quality and diverse text material⁸.

The PSB purposes and characteristics are deliberately looser than the formal quotas for annual hours of particular genres. Their development was in recognition of the fact that some television programme genres are becoming less distinct, and can vary significantly in the degree to which they can be described as PSB. However, this is not to say that analysis of genres cannot provide useful contextual information and so, in cases where the link between a genre and a purpose or characteristic is particularly relevant, data about this genre have been reported appropriately.

Figure 2 sets out the programme genres that are thought most applicable to each of the PSB purposes.

Figure 2 PSB purposes and their applicability to programme genres

PSB purpose	Most relevant programme genres
Purpose 1: Informing our understanding of the world	<ul style="list-style-type: none"> • UK/national News • Current Affairs • Nations and regions News and Current Affairs
Purpose 2: Stimulating knowledge and learning	<ul style="list-style-type: none"> • Factual • Arts • Music • Education • Religion and Ethics • Children's <i>Note: this is reported within a separate section within this report.</i>
Purpose 3: Reflecting UK cultural identity	<ul style="list-style-type: none"> • Nations and regions non- News programming
Purpose 4: Representing diversity and alternative viewpoints	<ul style="list-style-type: none"> • No specific genres are explicitly linked to this purpose – many genres can support it
Other genres that may delivering across purposes	<ul style="list-style-type: none"> • Sport • Drama • Comedy <p><i>Note: given that these genres may be contributing to a variety of purposes, these are reported in a separate section within this report.</i></p>

Ofcom's second PSB Review

Ofcom's second PSB Review *Putting Viewers First* focused on how to ensure the delivery of content that fulfils public purposes and meets the interests of citizens and consumers in the evolving broadcasting sector. This review concluded in January 2009⁹. The main

⁸ See later notes on Teletext.

⁹ For more detail see http://www.ofcom.org.uk/tv/psb_review/

conclusions are outlined below (see Figure 3). Following the review, Ofcom also made regulatory changes, effective from 2009, designed to benefit PSB in the short term¹⁰ (see Figure 4).

Figure 3 PSB Review – Main conclusions, 2009

Ofcom's *Second Public Service Broadcasting Review: Putting viewers first*

The review concluded that the existing model of commercial public service broadcasting was no longer sustainable and that difficult decisions about the use of scarce resources would need to be made by Government.

Main priorities are:

- To maintain the BBC's role and funding for its programmes and services at the heart of the overall system.
- To support investment in, and wide availability of, high quality original programming and UK and international news, by positioning the Channel 3 and Channel 5 services as commercial networks with a limited public service commitment, with modest licence benefits balanced by appropriate obligations on a sustainable basis.
- To plan now to ensure the supply of a choice of high quality news alongside the BBC in the devolved nations and English regions. This should include developing proposals for a new approach based on independently funded news consortia.
- To ensure there is a financially robust alternative provider of public service content alongside the BBC, with Channel 4 at its heart, preferably based on partnerships, joint ventures or mergers, with the scale necessary to sustain effective delivery of public purposes across digital media. A new remit, governance and accountability will be essential.

¹⁰ For more detail see http://www.ofcom.org.uk/consult/condocs/psb2_phase2/shortterm/

Figure 4 Short-term regulatory decisions: 2009

Statement on short term regulatory decisions		
<i>Issue</i>	<i>Licensee/channel</i>	<i>Summary of Ofcom's decision</i>
Volume of regions and nations News slots	All channel 3 regions	Allow reduction in volume from 5h 20m to 4h per week reflecting loss of mid-morning and weekend daytime bulletins; 3h 45m in English regions. Peak-time (1800-2230) requirement remains.
Volume of programming other than news for Wales	ITV plc	Reduce quota from 4h per week in 2008 to 90 min per week, maintaining as now 45 minutes in peak, 30 min in near-peak (1700-1800, 2230-2330). Current affairs within this to remain at present level of 47min per week.
Volume of programming other than news in Scotland	stv	Reduce quota from 4h per week in 2008 to minimum of 90 min per week (as with ITV Wales, peak, near-peak and current affairs elements within this to remain at present levels). Reductions in Gaelic obligations in line with intentions of Ofcom's first PSB Review.
Volume of programming other than news in Northern Ireland	UTV	Reduce quota from 4h per week in 2008 to minimum of 2h per week (as with ITV Wales and stv, peak, near-peak and current affairs elements within this to remain at present levels)
Pattern of regional news programmes in some regions	ITV plc	Merger of news services in: Border and Tyne Tees; West and Westcountry; Thames Valley and Meridian. This except for leading stories of 15 mins duration in 6pm weekday programme, and full 9 min bulletin after <i>News at Ten</i> . These would remain separate for each region. Separate subregional output in Central East/West; Anglia East/West; and Yorkshire East/West would reduce to 6 mins within 6pm programme and full bulletin after <i>News at Ten</i> .
Volume of content other than news for English regions	ITV plc	Reduce quota from 30 min per week previously agreed for 2009 to 15 min, all in peak and near-peak. This may be accommodated in news slots.
Volume of combined news and other content	Channel TV	Reduce quota from 5h 38m to 4h per week.
Volume of network current affairs	All Channel 3 regions	Reduce from 90 min per week to 50 min from 2010 (40 min in peak, as previously).
Out-of-London network production quota	All Channel 3 regions	Reduce spend and volume quotas from 50% to 35%.
Out-of-London production quota	Channel 4	Increase spend and volume quotas from 30% to 35%, of which a minimum 3% from outside England from 2010. Review both quotas when future of Channel 4 is clearer.
Original production quota	Five	Reduce quota for original productions from 53% to 50% (and 42% to 40% in peak).
Pages of news and content other than news	Teletext	Reduce number of regional news regions from 19 to 13, while increasing page count in each region by 40%; cut regional coverage of content other than news on analogue; reduce national news volume.

Digital Economy Act 2010

As mentioned earlier in this document, the Digital Economy Act is now in force and the majority of sections became effective from June 2010. This means that in addition to the requirements outlined above, from June 2010 the Act extends Ofcom's PSB reporting duties to include public service content online and on VoD, as well as on television and radio. It

also introduces new powers for Ofcom to monitor and enforce C4C's media content duties, to report on whether the public teletext service licence remains commercially sustainable, and to assess the public value of continuing the service. However, the data reported here precede the Digital Economy Act 2010, and reporting focuses largely on PSB delivery through television services, rather than public service content (PSC) more broadly.

Statements of programme policy (SOPPs)

This report also aims to provide objective evidence to inform licensees' annual statements of programme policy (SOPPs) and self-assessment reviews (SARs). This is the annual process by which independent PSB broadcasters publish their programme policy; reviews of the previous year's output are a statutory requirement for broadcasters, introduced by the 2003 Communications Act.

Broadcasters are required to complete their statements and reviews each year with regard to Ofcom guidance, which is published in the form of a Guidance Note. The independent PSB broadcasters are the ITV1 network; Channel 4; Five; GMTV¹¹; Teletext; and the ITV nations/regions. The BBC and S4C have different arrangements, but nonetheless produce their own statements and reviews. This report provides context for these publications.

S4C's remit

The Welsh Authority had the statutory responsibility to provide S4C (analogue) and S4C Digidol (digital) services for viewers in Wales¹². However, the S4C analogue service ceased broadcasting at midnight 30 March 2010 when the digital switchover process completed in Wales.

Along with around 48 hours per week of Welsh language programmes at peak times, S4C analogue used to broadcast re-scheduled, and live, Channel 4 programmes at other times. S4C Digidol broadcasts around 102 hours per week of Welsh language programmes¹³.

S4C is a 'commissioner broadcaster' and the majority of its programmes are sourced from independent producers. In addition, the BBC supplies a minimum of 10 hours per week of programmes, free of charge, to the Authority; these are funded by the BBC's licence revenue, along with additional programmes commissioned by S4C. ITV Wales also contributes programmes to S4C.

Details of S4C's statutory requirements, as outlined in the Communications Act 2003, are as shown in Figure 5.

¹¹ GMTV holds a separate licence from ITV1 and has separate obligations and commitments.

¹² S4C Digidol is also available outside Wales on digital satellite on channel 134, and is streamed live on broadband at s4c.co.uk and on some IPTV networks.

¹³ All Welsh language output shown on analogue is also shown simultaneously on S4C Digidol. The rest of the schedule comprises new programming, extended coverage of certain cultural and sporting events, repeats and archive material.

Figure 5: S4C's statutory requirements

On analogue:	On digital:
Provision of a broad range of high quality and diverse programming	Provision of a broad range of high quality and diverse programming
A service in which a substantial proportion of the programmes consist of programmes in Welsh	A service in which a substantial proportion of the programmes consist of programmes in Welsh
The programmes broadcast between 6.30pm and 10pm every day consist mainly of programmes in Welsh	
The programmes that are not in Welsh are normally programmes which are being, have been, or are about to be, broadcast on Channel 4	

The 2003 Communications Act also specifies that its services must include news and current affairs programming. There is no requirement for S4C regarding children's programmes , although in its 2008 Annual Report, S4C set its own target of 140 hours of originated children's programmes per year.

Public service text services

The BBC operates analogue (Ceefax) and digital TV (BBCi) text services under service licences issued by the BBC Trust. The public Teletext service was a designated public service broadcaster, as set out in the 2003 Communications Act. The licensee, Teletext Ltd, provided text pages behind the analogue broadcasts of ITV1, Channel 4 and the digital channel 100. The licensee also operated other digital services, such as Teletext Holidays and the services behind the digital broadcasts ITV1 and Channel 4, outside the scope of the licence.

However, on July 16 2009, the Daily Mail & General Trust plc (DMGT) announced its intention to hand back its PSB licence and shut down both the PSB analogue and PSB digital terrestrial television service. Teletext Ltd ceased to provide services in December 2009, and its licence was revoked by Ofcom in January 2010.

This document reports on data collected throughout 2009, when Teletext was still operating, therefore the requirements as set out in the Communications Act 2003 were still relevant:

- contributing to the PSB objectives generally (s264) along with the other public service broadcasters;
- providing a range of high quality and diverse text material (s265); and
- completing a similar statement of programme policy (SOPP) process to the other commercial licensees, involving preparing a statement of service policy and monitoring performance in carrying out the proposals.

The public Teletext licence specified a certain amount of pages of text in genres that relate to the PSB remit and the PSB purposes and characteristics. These requirements were revised in January 2009 following Ofcom's second PSB Review¹⁴. Simplified, these requirements relate to regional news and non-news provision, and to the provision of national news:

- not less than 20 main pages of UK/national news on both the analogue and digital service;
- not less than 12 main pages of regional news on both the analogue and digital service; and
- not less than 24 main pages of regional non-news pages on both the analogue service and digital service.

The Digital Economy Act 2010 contains new clauses requiring Ofcom to make a report to the Secretary of State at DCMS on whether the public Teletext licence should be re-advertised, or whether the Secretary of State should remove Ofcom's duty to do so. This report does not cover this requirement, due to the timing of the Act and the data collection for this report.

¹⁴ *Ofcom's Second Public Service Broadcasting Review: the Digital Opportunity*, April 2008.

Annex 2

Methodologies

This annex includes information about the research data sources within this report. Further detail and the data itself for official statistics can be found at:

<http://www.ofcom.org.uk/research/stats/>

2.1 PSB Tracker

Data collection

The Ofcom PSB Tracker is conducted via telephone interviews (CATI) with adults aged 16 and over. The first full year of fieldwork was 2006. Fieldwork is conducted each year during four months: January, April, July, and October, chosen to represent the range of the broadcast year. In 2006, a total of around 1,874 interviews were conducted per quarter (approximately 1070 in England; 268 in Scotland; 268 in Wales; 268 in Northern Ireland). In 2007, 2008 and 2009, a total of around 1,750 interviews were conducted per quarter (approximately 990 in England; 250 in Scotland; 250 in Wales; 250 in Northern Ireland).

The average interview length in 2009 was 23.25 minutes. Fieldwork was conducted by GfK NOP.

The Welsh sample was boosted each quarter with an additional 50 interviews among viewers of Welsh language programming on S4C to enable reporting on S4C. Respondents were offered the option of a Welsh language interview if preferred.

Weighting

Quotas were applied and survey data were weighted to be nationally representative of adults 16+. Weights were applied to: gender, age, region, social grade and ethnicity, using data from mid-2004 population estimates (ONS). The Welsh boost survey data were also weighted, but to a profile of adults 16+ who watched any Welsh language programmes.

Main questionnaire

The focus of the questionnaire is questions asking respondents to rate specific TV channels on different aspects of broadcasting relating to the PSB purposes and characteristics. The research statements that they were asked about correspond to the purposes and characteristics as set out in Figure 6.

Figure 6 PSB purposes and characteristics and their alignment with PSB Tracker statements

PSB purposes and characteristics	PSB Tracker statements
Purpose 1: To inform ourselves and others and to increase our understanding of the world through news, information and analysis of	Its news programmes are trustworthy Its programmes help me understand what's going on in the world

current events and ideas	today Its news programmes for people in (nation) provide a wide range of good quality news about (nation) (asked in the devolved nations) ¹⁵ Its Regional News programmes provide a wide range of good quality news about my area (asked in England)
Purpose 2: To stimulate our interest and knowledge of the arts, science, history and other topics through programmes that are accessible and can encourage informal learning	It shows interesting programmes about history, sciences or the arts As a result of watching its programmes I've become more interested in particular subjects
Purpose 3: To reflect and strengthen our cultural identity through original programming at UK, national and regional level, and by occasionally bringing audiences together for shared experiences	<i>UK cultural</i> It covers big national events well, like sports, music events or major news stories It shows high quality Soaps or Drama made in the UK Provides a wide range of high quality and UK-made programmes for children* <i>Nations and regions</i> Its entertainment and factual programmes show people from different parts of the UK It portrays my region well to the rest of the UK Aside from news, it provides a range of good-quality programmes about my nation, made for people in my nation
Purpose 4: To make us aware of different cultures and alternative viewpoints, through programmes that reflect the lives of other people and other communities, both within the UK and elsewhere	Its programmes show different kinds of cultures in the UK** Its programmes offer a range of opinions on subjects and issues**
High quality – well funded and well produced	It shows well-made, high quality programmes
Original – new UK content rather than repeats or acquisitions	It shows enough new programmes, made in the UK
Innovative – breaking new ideas or re-inventing exciting approaches, rather than copying old ones	It shows programmes with new ideas and different approaches
Challenging – making viewers think	It shows programmes that make me stop and think
Engaging – remaining accessible and attractive to viewers	It shows programmes I want to watch Its programmes reflect the interests and concerns of people like me
Trust ¹⁶	I trust this channel*

* Statements added to the PSB Tracker for 2007

**Statements changed within the PSB Tracker in 2008

Respondents were asked to individually rate each channel that they watched regularly. The channels list comprised BBC One, BBC Two, ITV1, Channel 4/S4C, Five, BBC Three, BBC Four, BBC News and BBC Parliament. Those who viewed any of these channels regularly or occasionally were also asked to consider all of the channels together for each of the research statements. Statements on BBC Three, BBC Four, BBC News and BBC Parliament were only asked of multi-channel households. BBC News 24 was added to the questionnaire

¹⁵ In previous PSB Annual Reports findings relating to nations and regions news were reported in sections relating to Purpose 3.

¹⁶ This was included as a statement in the PSB Tracker in order to monitor the extent to which trust is assigned to the main PSB channels as the digital TV environment expands. The statement was also included partly as a result of the issues surrounding phone votes within programmes on the PSB channels and in order to understand opinions on the channels after the resolution of this.

in April 2007 and was changed to 'BBC News (formerly called BBC News 24)' in the survey in July 2008. BBC Parliament was also added in July 2008.

Respondents were asked to rate the channel in relation to a statement on a 10-point scale where 10 is the highest score and 1 the lowest. Prior to July 2008, viewers had been asked the extent to which they felt the statement applied (10 = applies completely; and 1 = does not apply at all) to each channel. Both statements were tested against each other in July 2008, with no major differences found in terms of the ratings provided using the slightly different wording.

The order of asking about individual channels was rotated to minimise order bias. Fifty per cent of the sample was asked about channels in order A below, and the remainder asked in order B:

- A: BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, ITV1, Channel 4, Five, all channels combined
- B: ITV1, Channel 4, Five, BBC One, BBC Two, BBC Three, BBC Four, BBC News, BBC Parliament, all channels combined

Respondents were also asked to rate how important it is that the PSB channels together fulfil the PBS purposes and characteristics. This provides useful context for the data on how the PSB channels are rated on these elements. From Q4 2007, half of the sample group were asked about 'personal' and then 'societal importance' while half were asked about 'general importance'.

The 2009 questionnaire incorporated two main changes compared to the previous year. In Q2 2009 a new question was added which asked respondents to compare their satisfaction with one year ago. This was followed by an open-ended question, which enabled respondents to explain the reasons for their increased or decreased satisfaction in their own words. In addition, from Q3 2009, three further questions were added, designed to ascertain respondents' use of DVRs (digital video recorders) TV on demand and online viewing.

Questionnaire modules

During each quarterly period of fieldwork, one of three 'modules' was inserted into the main questionnaire. These modules were inserted as follows in 2009:

Q1 (5th January - 4th February) = Internet Module (designed to explore the types of PSC viewed on the internet, how this content is found and respondents' opinions of the content)

Q2 (1st - 30th April) = Digital channels module (respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular viewers of these)

Q3 (1st July - 3rd August) = Teletext module

Q4 (1st - 31st October) = Digital channels module

In the digital channels module, respondents were also asked to rate a selection of non-PSB channels and PSB digital portfolio channels if they were regular viewers of these. The digital channels module had a similar structure to the main questionnaire, asking respondents to state the frequency with which they watched a variety of digital channels: ITV2, E4, Sky1, More4, UKTV History/Yesterday, Sky News, Discovery Channel, and Living. Those who watched each channel regularly were then asked to rate these channels on a number of

statements relating to a range of areas (e.g. news, current affairs and other factual programmes, programme quality). Only relevant questions were asked about each channel so that, for example, questions concerning news were not asked about those channels on which news is not shown.

The digital channels module differed from the main survey in that satisfaction with 'all channels combined' and 'importance rating' questions were not asked.

The Teletext module (Q3 2009) firstly explored the frequency with which Teletext, Ceefax, BBCi and Skytext were used, and then asked respondents to name (from a pre-coded list) the types of information they accessed on digital and analogue Teletext. The final section asked respondents to rate digital or analogue Teletext, for seven statements, on a scale of 1 to 10, where 10 was the highest rating and 1 was the lowest. These statements referred to topics such as the frequency with which Teletext is updated, its relevance to its audience and the quality of its news and general content.

In January 2009, a new module concerning online public service content was created within the PSB Tracker telephone survey. This questionnaire was designed to explore the types of public service content viewed on the internet, how this content is found, and respondents' opinions of it, and was based on an omnibus survey carried out by GfK in June 2008.

Those who claimed to use the internet for public service content were asked the extent to which they agreed with five statements, such as: '*The internet is a good source of new public service content*'. In the January 2010 version of this module the number of statements was reduced from five to three. In both 2009 and 2010, all respondents (regardless of their use of the internet) were asked to rate the importance of 15 statements, where 1 represents 'not at all important', and 10 represents 'extremely important'. These statements were designed to address similar topics to the main survey and included statements such as: "*Helps me to learn and find out about subjects*". The January 2010 internet module also featured two new questions relating to the BBC and Channel 4 websites. These asked respondents to rate the importance of online video services and trustworthy content.

Welsh boost

During each quarter of fieldwork, a Welsh boost questionnaire was run alongside the main survey. This questionnaire mirrored the content of the main questionnaire, (with the same statements being rated), but asked only about S4C, all channels combined and importance ratings. The interchangeable modules used in the main questionnaire were not inserted into the Welsh boost. Those who did not watch any of the S4C programmes in Welsh, and those who did not watch S4C regularly, were screened out.

Analysis and reporting conventions

The majority of analysis was carried out on 'regular' viewers. Regular viewers provide a more informed opinion as they are more involved with the channels, and rely less on potentially out-of-date or unfounded perceptions of the channel (see *PSB Audience Impact, PSB Report 2010, Information pack E* for more detail).. Moreover, including 'occasional' viewers increases the level of 'don't know' responses, thereby reducing the granularity of the insight provided.

Viewers were asked to rate each channel (and the channels taken together) out of 10, and the top four scores (7-10) were used to calculate responses, correlating to a very/quite response. Throughout the report this is expressed as: "the channel is rated highly on...".

Throughout this document, only statistically significant differences will be reported within the text and also highlighted on the charts. Reported differences between survey figures are significant at the 99% level to accommodate the impact of sample design and weighting. This means that there is a high level of confidence that any reported differences reflect a true attitudinal or behavioural change rather than being caused by a change in sample methodology or profile. In previous reports, significance testing was performed at the 95% level, so this represents a more robust approach to reporting.

2.2 Output and spend data *PSB Channels*

PSB channels

Wherever possible, data have been provided for BBC One, BBC Two, ITV1, GMTV1, Channel 4, Five and the BBC's PSB digital channels: BBC Three, BBC Four, CBBC, CBeebies, BBC News and BBC Parliament. BBC HD has been excluded from most of the analysis in the report, as much of its output is simulcast from the core BBC channels and therefore would represent a disproportionate amount of duplicated broadcast hours and spend. Please refer to individual footnotes and chart details indicating when a smaller group of these channels is being reported on. ITV1 includes GMTV1 unless otherwise stated. Data for S4C are shown in a separate section, apart from S4C's children's output which is included within the children's section of the report (purpose 3).

Spend data

Programme spend represents the total cost of production or acquisition, including rights costs but excluding third party investment. In the case of commissions, it represents the price paid to the independent producer (and therefore includes a mark-up on production costs).

Trend data showing programme costs over a number of years are given in 2009 prices (i.e. taking account of inflation, using the Consumer Prices Index, as provided by the National Statistics Office).

Output hours

The output data in this report are collected by Ofcom from the broadcasters each year, as part of their PSB returns.

Definition of peak time

The standard definition of peak time is from 6pm to 10.30pm. However, for BBC Three and BBC Four peak time runs from 7pm (when broadcasting starts on these channels) to 10.30pm, except where otherwise stated.

Genre definitions

The output data provided by the broadcasters use a set of programme genre definitions, as outlined below and agreed with broadcasters in 2006. Please note that these genres are defined for our monitoring and reporting purposes, and do not necessarily correspond to definitions used in broadcasting legislation, such as the Audio-visual Media Services Directive.

Outlined below are the definitions used for the data in this report:

News

- Newscast or news bulletin providing national, international or regional news coverage.
- News magazines which may contain a range of items related to news stories, with comment and elements of general interest.
- Coverage of parliamentary proceedings and political coverage.
- Weather forecasts and bulletins, including reports on air quality, tide times etc.

Current Affairs

- A programme that contains explanation and analysis of current events and issues, including material dealing with political or industrial controversy or with public policy.
- Topical programmes about business matters and financial issues of current interest.
- Political debates, ministerial statements, party conferences.

Arts & Classical Music

- A programme displaying or presenting a cultural or artistic performance or event.
- Programmes providing information, comment or critical appraisal of the arts.
- The subject matter can cover theatre, opera, music, dance, cinema, visual arts, photography, architecture and literature.

Religious & Ethics

- All forms of programming whose focus is religious belief, for example: programmes intended to provide religious inspiration through words and/or music, and informational programmes explaining doctrine, belief, faith, tenets, religious experiences or topics providing a religious world view.
- Coverage of religious acts of worship of all faiths.
- Life experience: moral, ethical, spiritual - exploring one or more of the following issues at some point in the programme: (i) a recognisable religious perspective forming a significant part of the overall narrative; (ii) an exploration of people's daily lives whose attitudes could be said to be informed by a religious background or tradition; (iii) an exploration of people's perception of, and attitudes to, philosophies which address the big questions of life that affect them. These must demonstrate an approach that bears in mind a religious faith/belief context.

Education

- Programmes with a clear educational purpose, usually backed by specially prepared literature publicised on screen and in other appropriate ways. Includes programmes for Schools, BBC Learning Zone and Open University programmes.
- Programmes reflecting social needs and promoting individual or community action. Also includes Campaign weeks on particular subjects, e.g. bullying, drugs.

General Factual

- All types of factual programmes, included in the genres listed below.

Specialist Factual

- History - programmes about historical times or events, including programmes about archaeology
- Nature & Wildlife - natural history and programmes about environmental issues.
- Science & Technology - programmes about scientific issues, new discoveries, medical matters and new technological developments

Other Factual

- General factual programmes, including consumer affairs.
- Lifestyle programmes, hobbies and leisure interests, including makeover shows.
- Daytime magazine programmes and talk shows
- Coverage of special events, not generated by the broadcaster, including commemorative events, royal events.

Factual Entertainment

- Popular factual material, including reality shows, docusoaps and other Factual Entertainment.

Drama

- All drama including comedy drama and TV movies but excluding soaps which are classified separately.
- Docu-drama - based on reality, telling the story of actual events.

Soaps

- Drama programmes with a continuous storyline and fixed cast, normally with more than one episode each week and shown every week of the year and usually (but not necessarily) of 30 minutes duration.

Films

- All feature films that have had a prior theatrical release including films commissioned by the broadcaster.

Entertainment

- All forms of entertainment programme, including panel games, chat & variety shows, talent contests
- Quiz and game shows
- Pop music video shows
- Contemporary music - coverage of popular music events and performances, such as OB concerts or as-live studio based shows.

Comedy

- All forms of scripted comedy, satire, stand-up, and sketch shows
- Situation comedy - dramatised entertainment in a humorous style, usually with a fixed cast and generally of 30 minutes' duration.

Sport

- All forms of sports programming including coverage of sporting events.

Children's

- All types of programmes designed for a children's audience, including:
 - Drama
 - Entertainment shows, including weekend magazines and animations and cartoons, including puppets which are designed for a children's audience.
 - General information programmes and News for children.
 - Education and factual programmes for pre-school children.

Changes in genre definitions

The programme classifications were updated in 2006 and therefore the figures for certain genres may be slightly different from earlier reported figures. It has not been possible to go back and re-classify pre-2006 data, therefore analysis of trends using the new breakdowns is not possible for the full five years in all areas.

The following changes should be noted in the composition of the figures 2006 and later:

- Drama includes TV movies which were previously added to Films. Entertainment includes contemporary music but Comedy is now shown separately and includes situation comedy and scripted comedy.
- Specialist Factual includes Science & Technology, History, Nature & Wildlife and other documentaries.
- Other Factual includes Hobbies & Leisure, Factual Magazines, Consumer Magazines and General Factual.
- Factual Entertainment includes reality shows. In previous years some Factual Entertainment programmes were included within Entertainment.

2.3 Viewing figures – BARB

These data are provided by BARB (Broadcasters' Audience Research Board), a panel of 5,100 homes providing TV measurement for the industry.

The majority of the analysis focuses on total annual viewing hours for genres, which shows the total annual hours of viewing by an average individual of a given programme genre. The proportion of viewing of programme genres is also included, as is average weekly reach and audience share figures. Most figures show viewing averages for all viewers aged 4+, the standard universe for the BARB currency.

2.4 Programme genre definitions

The output hours and viewing figures use different datasets, which have slightly different programme classifications. The main differences are shown in Figure 7 below, which also provides illustrative programmes for the various genres as classified by the output hours.

Figure 7 Comparison of selected programme genre classifications and illustrative programme titles

Genre	Illustrative programmes	Output hours	BARB viewing figures
National and International News	<ul style="list-style-type: none"> • <i>BBC News at Ten</i> (BBC One) • <i>News at Ten</i> (ITV1) 	<ul style="list-style-type: none"> • Excludes Regional News • GMTV output is divided between News, Current Affairs, Factual, and Children's 	<ul style="list-style-type: none"> • Includes <i>Newsnight</i> on BBC Two • GMTV output is divided between News and Other Factual (for features) • Does not include regional News
Current Affairs	<ul style="list-style-type: none"> • <i>Question Time</i> (BBC One) • <i>Newsnight</i> (BBC Two) • <i>Tonight with Trevor McDonald</i> (ITV1) • <i>Dispatches</i> (C4) • <i>The Wright Stuff</i> (Five) 	<ul style="list-style-type: none"> • Excludes consumer affairs (which is categorised under Other Factual) 	<ul style="list-style-type: none"> • Includes political, economic, social, consumer affairs. (<i>The One Show</i> is classified as CA in BARB.)
Other Factual	<ul style="list-style-type: none"> • <i>Watchdog</i> (BBC One) • <i>Gardener's World</i> (BBC Two) • <i>60 Minute Makeover</i> (ITV1) • <i>A Place in the Sun</i> (C4) • <i>Hotel Inspector</i> (Five) 	<ul style="list-style-type: none"> • Includes consumer affairs, Factual Entertainment, leisure and hobbies, talk shows and factual magazine shows 	<ul style="list-style-type: none"> • Includes human interest, Factual Entertainment, hobbies and leisure
Specialist Factual	<ul style="list-style-type: none"> • <i>One Life</i> (BBC One) • <i>Horizon</i> (BBC Two) • <i>Born Survivor: Bear Grylls</i> (C4) • <i>Banged up Abroad</i> (Five) 	<ul style="list-style-type: none"> • Includes natural history, science and technology, history, other documentaries and special events 	<ul style="list-style-type: none"> • Includes natural history, science and medical, history, factual Drama
Education	<ul style="list-style-type: none"> • BBC Learning Zone • Channel 4 Schools 	<ul style="list-style-type: none"> • Includes Formal Education and Schools programmes 	<ul style="list-style-type: none"> • Includes schools' programmes
Entertainment	<ul style="list-style-type: none"> • <i>My Family</i> (BBC One) • <i>Never Mind the Buzzcocks</i> (BBC Two) • <i>Britain's Got Talent</i> (ITV1) • <i>8 out of 10 Cats</i> (C4) • <i>Cooking the Books</i> (Five) 	<ul style="list-style-type: none"> • Includes Comedy and sitcoms • Includes contemporary music 	<ul style="list-style-type: none"> • Includes contemporary music • Includes Comedy for overviews; although UK comedy is separated off for analysis of PSB purpose 3
Originated Drama	<ul style="list-style-type: none"> • <i>Waterloo Road</i> (BBC One) • <i>Torchwood</i> (BBC Two) • <i>Heartbeat</i> (ITV1) • <i>Shameless</i> (Channel 4) 	<ul style="list-style-type: none"> • Includes 'made for TV' films • Includes Factual Drama 	
Originated Soap	<ul style="list-style-type: none"> • <i>Coronation Street</i> (ITV1) • <i>EastEnders</i> (BBC One) 	<ul style="list-style-type: none"> • Excludes <i>The Bill</i> 	<ul style="list-style-type: none"> • Includes <i>The Bill</i>
Films		<ul style="list-style-type: none"> • Excludes 'made for TV' films 	<ul style="list-style-type: none"> • Includes 'made for TV' films